

Traffic Update

5th May, 2009

EUROPEAN AIRLINE TRAFFIC IN MARCH, PRELIMINARY RESULTS FOR APRIL Airlines strive to contain costs as revenues tumble

The Association of European Airlines has released traffic and capacity data for its members in March 2009.

Passenger traffic continued its headlong slide with a minus 9.1%. All traffic regions displayed a negative with the exception of a very small increase, of 0.5%, on Europe-Middle East. Biggest losers, with double-digit decreases, were the North Atlantic and Cross-border Europe.

With just a 2.1% decrease in capacity, load factor was down by a massive margin of 5.5 points, to 72.0%.

Preliminary AEA figures for April, based on weekly returns, show a much reduced rate of traffic loss, at around 2.5%. Wide variations in March/April are commonplace and reflect the movable Easter break, but the figures are nonetheless encouraging. More importantly, a slightly higher rate of capacity decrease appears to have largely stabilised load factors.

As the crisis unfolds, the airfreight market has been a focus of attention as it has undergone a substantial collapse in volumes. The March traffic loss of 17.1% was less extreme than in the three preceding months, but indicators for April are that the shortfall on last year's volumes will again be in excess of 20%.

Said AEA Secretary General Ulrich Schulte-Strathaus: *"What the figures do not tell us is which passengers are not flying. Revenues are decreasing even faster than traffic volumes. Airlines are reducing their internal costs, but face difficulties in reducing costs which are imposed upon them"*.

- Adria Airways
- Aer Lingus
- AeroSvit
- Air France
- Air Malta
- Air One
- Alitalia
- Austrian
- bmi
- British Airways
- Brussels Airlines
- Cargolux
- Croatia Airlines
- Cyprus Airways
- Czech Airlines
- DHL
- Finnair
- Iberia
- Icelandair
- Jat Airways
- KLM
- LOT
- Lufthansa
- Luxair
- Malev
- Olympic Airlines
- SAS Scandinavian Airlines
- SWISS
- TAP Portugal
- TAROM
- TNT Airways
- Turkish Airlines
- Ukraine International Airlines
- Virgin Atlantic Airways

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- Brussels Airlines
- Cargolux
- Croatia Airlines
- Cyprus Airways
- Czech Airlines
- DHL
- Finnair
- Iberia
- Icelandair
- Jat Airways
- KLM
- LOT
- Lufthansa
- Luxair
- Malev
- Olympic Airlines
- SAS Scandinavian Airlines
- SWISS
- TAP Portugal
- TAROM
- TNT Airways
- Turkish Airlines
- Ukraine International Airlines
- Virgin Atlantic Airways

Capacity reductions would provide some relief, he said, predicting that cutbacks would become more evident as the Summer progressed. *"We are hoping for imminent confirmation that airlines will be able to temporarily reduce frequencies without putting their airport slot entitlements at risk. While this is a very positive step, the downside is that airports are all too ready to increase their charges to maintain their profit levels"*. Mr Schulte-Strathaus referred to newly-announced first quarter results from UK airport operator BAA: *"Passengers down 10%, revenues up 16%, profits up 28% - that's quite some business model, if one that has lost touch with its customers"*.

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Note to the Editor: The Association of European Airlines (AEA) brings together 34 European established scheduled network carriers. These collectively carry 370 million passengers and 7 million tonnes of cargo each year, operating 2,600 aircraft serving 615 destinations in 165 countries with 11,575 flights a day. They provide around 423,000 jobs directly, and generate a total turnover of €78 billion

Traffic Update

Scheduled Services of AEA Member Airlines

MARCH 2009

REGION	PASSENGER DATA								FREIGHT DATA	
	Passengers boarded (000)	Traffic RPK (mill)	Capacity ASK (mill)	Load Factor %	Change to Previous Year				Traffic TFTK (mill)	TFTK %
					Pax %	Traffic %	Capacity %	PLF Pts		
Domestic (1)	6 157.3	3 247.8	5 144.8	63.1	-8.1	-8.7	-2.0	-4.6	7.4	-16.5
Cross-border Europe (2)	11 862.6	12 537.0	19 853.4	63.1	-10.2	-10.2	-1.8	-6.0	56.2	-14.7
Total Europe (1+2)	18 019.8	15 784.7	24 998.1	63.1	-9.5	-9.9	-1.8	-5.7	63.6	-14.9
Europe - North Africa (3)	313.1	658.5	945.6	69.6	-3.8	-3.0	-0.1	-2.0	18.6	16.0
Europe - Middle East (4)	675.6	2 341.4	3 399.4	68.9	2.7	0.5	9.2	-5.9	93.7	-3.3
Intl Short/Medium Haul (2+3+4)	13 012.5	15 536.9	24 198.3	64.2	-8.3	-8.5	-0.3	-5.7	168.5	-5.8
North Atlantic (5)	1 888.2	13 001.2	17 217.4	75.5	-12.8	-12.6	-3.7	-7.8	766.6	-15.5
Mid Atlantic (6)	552.2	4 161.5	5 134.2	81.1	-8.9	-8.2	-1.7	-5.7	119.0	-7.8
South Atlantic (7)	414.9	3 708.6	4 928.6	75.2	-10.2	-8.8	-4.9	-3.2	187.1	-23.6
Europe - Sub Saharan Africa (8)	701.4	4 740.6	6 288.7	75.4	-1.4	-3.0	-0.6	-1.9	287.4	-2.3
Europe - Far East/Australasia (9)	1 479.6	11 914.5	15 284.2	78.0	-7.6	-8.7	-3.0	-4.8	1 113.1	-22.3
Total Longhaul (5 to 9^x)	5 050.9	37 546.3	48 890.4	76.8	-9.3	-9.4	-3.0	-5.4	2 473.3	-17.8
Total International (2 to 9^x)	17 902.2	53 083.2	73 088.7	72.6	-9.4	-9.1	-2.1	-5.6	2 641.8	-17.1
Total Scheduled (1 to 9^x)	24 059.4	56 331.0	78 233.4	72.0	-9.1	-9.1	-2.1	-5.5	2 649.2	-17.1

JANUARY - MARCH 2009

REGION	PASSENGER DATA								FREIGHT DATA	
	Passengers boarded (000)	Traffic RPK (mill)	Capacity ASK (mill)	Load Factor %	Change to Previous Year				Traffic TFTK (mill)	TFTK %
					Pax %	Traffic %	Capacity %	PLF Pts		
Domestic (1)	16 653.0	8 784.7	14 186.0	61.9	-12.6	-12.2	-8.0	-3.0	21.0	-19.5
Cross-border Europe (2)	31 793.8	33 388.2	55 310.1	60.4	-9.8	-9.0	-4.1	-3.3	153.5	-17.3
Total Europe (1+2)	48 446.8	42 172.8	69 496.0	60.7	-10.8	-9.7	-4.9	-3.2	174.5	-17.6
Europe - North Africa (3)	839.7	1 765.1	2 660.6	66.3	-4.5	-4.1	-5.0	0.6	55.2	18.5
Europe - Middle East (4)	1 811.5	6 400.8	9 567.8	66.9	2.0	1.0	5.9	-3.3	241.0	-7.0
Intl Short/Medium Haul (2+3+4)	34 895.2	41 554.0	67 538.5	61.5	-7.9	-7.4	-2.8	-3.0	449.7	-8.5
North Atlantic (5)	5 155.1	35 513.2	48 289.3	73.5	-9.9	-9.7	-5.8	-3.1	2 110.8	-16.1
Mid Atlantic (6)	1 665.2	12 501.1	15 173.4	82.4	-5.5	-5.2	-0.8	-3.8	325.5	-12.1
South Atlantic (7)	1 311.0	11 659.9	14 726.0	79.2	-6.6	-5.6	-3.3	-1.9	496.8	-26.0
Europe - Sub Saharan Africa (8)	2 111.8	14 224.1	18 526.9	76.8	1.1	-0.9	-1.1	0.2	778.5	-7.4
Europe - Far East/Australasia (9)	4 302.1	34 719.0	44 170.7	78.6	-6.5	-6.9	-3.4	-3.0	2 893.6	-25.5
Total Longhaul (5 to 9^x)	14 597.0	108 720.8	141 060.8	77.1	-6.7	-6.8	-3.7	-2.6	6 605.4	-20.3
Total International (2 to 9^x)	49 042.0	150 274.8	208 599.3	72.0	-8.4	-7.0	-3.4	-2.7	7 055.1	-19.6
Total Scheduled (1 to 9^x)	65 695.0	159 059.4	222 785.2	71.4	-9.5	-7.3	-3.7	-2.7	7 076.1	-19.6

Passenger traffic is measured in Passengers boarded (Pax), RPK (Revenue Passenger-Kms) and capacity in ASK (Available Seat-Kms).

Freight traffic is measured in TFTK (Total Freight Tonne-Kms) on passenger and all-cargo services, excluding mail.

Growth rates have been adjusted for changes in membership.

Introduced in 2004, new route area Total Europe includes 'international' or Cross-border Europe services and Domestic services.

(^x) Longhaul region 'Other' is not shown above, but is included in the total.

Traffic Update

TOTAL SCHEDULED
Scheduled Services by Airline

MARCH 2009

AIRLINE	PASSENGER DATA								FREIGHT DATA	
	Passengers boarded (000)	Traffic RPK (mill)	Capacity ASK (mill)	Load Factor %	Change to Previous Year				Traffic TFTK (mill)	TFTK %
					Pax %	Traffic %	Capacity %	PLF Pts		
AF - AIR FRANCE	3 828.0	10 098.8	13 636.2	74.1	-9.7	-9.4	-2.3	-5.8	428.9	-21.7
AP - AIR ONE										
AY - FINNAIR	496.2	1 230.9	1 826.2	67.4	-5.0	-14.0	-8.1	-4.7	38.4	-21.5
AZ - ALITALIA										
BA - BRITISH AIRWAYS PLC	2 610.2	9 148.3	12 568.4	72.8	-8.1	-7.2	0.7	-6.2	380.6	-9.9
BD - BMI	627.9	671.2	1 016.2	66.0	-20.9	-17.6	-18.6	0.8	9.7	-7.9
CV - CARGOLUX									422.9	-12.6
CY - CYPRUS AIRWAYS	105.7	205.5	314.3	65.4	-10.4	-10.1	-7.9	-1.6		-100.0
FI - ICELANDAIR	70.7	179.7	249.4	72.0	-29.3	-31.8	-29.8	-2.1		
IB - IBERIA	1 764.1	4 225.3	5 365.1	78.8	-14.0	-7.0	-3.4	-3.1	69.8	-22.2
JP - ADRIA AIRWAYS	68.8	60.0	107.7	55.7	-14.3	-14.0	-1.2	-8.3	0.2	-16.6
JU - JAT AIRWAYS	62.4	62.6	126.8	49.4	-20.9	-19.6	-13.0	-4.1	0.2	-39.3
KL - KLM ROYAL DUTCH AIRLINES	1 751.0	5 732.3	7 372.0	77.8	-9.8	-9.3	-3.6	-4.9	353.7	-15.4
KM - AIR MALTA	91.7	155.6	227.0	68.5	-17.0	-3.8	-6.1	1.6	0.5	-15.5
LG - LUXAIR	55.9	30.6	56.5	54.1	-9.6	-15.8	-10.5	-3.4	0.0	-33.3
LH - DEUTSCHE LUFTHANSA AG	4 333.1	9 619.6	12 700.6	75.7	-2.2	-4.6	-0.1	-3.6	559.6	-24.6
LO - LOT POLISH AIRLINES	258.3	365.6	608.5	60.1	-19.6	-25.2	-13.9	-9.1	4.6	-41.0
LX - SWISS INTERNATIONAL AIRLINES	1 053.5	2 195.2	2 950.1	74.4	-4.8	-4.5	4.1	-6.7	93.8	-17.4
MA - MALEV HUNGARIAN AIRLINES	195.9	208.7	387.6	53.8	-15.9	-28.9	-14.3	-11.0	0.3	-57.4
OA - OLYMPIC AIRLINES	327.4	366.6	756.0	48.5	-20.7	-29.5	-6.7	-15.7	4.1	-36.4
OK - CZECH AIRLINES	325.3	376.5	659.4	57.1	-13.3	-16.4	-5.7	-7.3	2.3	-2.7
OS - AUSTRIAN	650.1	1 123.7	1 577.3	71.2	-13.7	-16.6	-12.5	-3.5	26.7	-26.7
OU - CROATIA AIRLINES	109.7	65.4	128.3	51.0	-9.0	-12.5	9.6	-12.9	0.2	-1.1
PS - UKRAINE INTERNATIONAL AIRLINES	52.9	91.3	187.5	48.7	-21.5	-22.5	2.5	-15.7	0.9	38.0
RO - TAROM ROMANIAN AIR TRANSPORT	109.8	120.8	273.2	44.2	-24.1	-29.8	-6.5	-14.6	0.4	-21.2
SK - SAS SCANDINAVIAN AIRLINES	1 874.9	1 922.8	2 951.0	65.2	-12.3	-17.9	-4.7	-10.5	22.9	-49.1
SN - BRUSSELS AIRLINES	364.9	495.4	889.4	55.7	-16.6	-17.8	-6.7	-7.5	6.8	-25.7
TK - TURKISH AIRLINES	1 733.7	2 688.7	4 021.3	66.9	8.0	9.7	20.7	-6.7	55.6	90.9
TP - TAP PORTUGAL	601.7	1 438.4	2 441.4	58.9	-17.1	-19.3	-9.8	-7.0	23.8	-18.1
VS - VIRGIN ATLANTIC AIRWAYS	429.8	3 184.6	4 443.6	71.7	-14.3	-12.7	-4.2	-7.0	139.0	-0.6
VV - AEROSVIT	105.8	266.9	392.5	68.0	-25.1	-19.5	-16.3	-2.7	3.4	-31.7
AEA	24 059.4	56 331.0	78 233.4	72.0	-9.1	-9.1	-2.1	-5.5	2 649.2	-17.1

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Scheduled Services by Airline

JANUARY - MARCH 2009

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					Pax %	Traffic %	Capacity %	PLF Pts		
AF - AIR FRANCE	10 613.6	28 920.5	38 805.1	74.5	-8.9	-6.6	-3.5	-2.5	1 131.7	-23.8
AP - AIR ONE										
AY - FINNAIR	1 488.7	3 728.1	5 339.8	69.8	-5.0	-5.0	-6.1	0.9	103.1	-21.5
AZ - ALITALIA										
BA - BRITISH AIRWAYS PLC	7 099.2	25 703.8	35 337.8	72.7	-7.5	-5.7	-3.7	-1.6	1 006.9	-15.5
BD - BMI	1 699.8	1 830.0	2 852.5	64.2	-20.1	-15.3	-25.8	7.9	24.9	-13.8
CV - CARGOLUX									1 133.4	-11.4
CY - CYPRUS AIRWAYS	292.1	551.3	869.1	63.4	-7.1	-7.0	-11.0	2.7	3.5	-74.2
FI - ICELANDAIR	188.6	477.9	712.8	67.0	-27.7	-29.9	-26.2	-3.5		
IB - IBERIA	4 640.9	11 763.2	15 376.6	76.5	-19.7	-9.5	-6.0	-2.9	202.2	-22.9
JP - ADRIA AIRWAYS	190.9	170.3	311.2	54.7	-14.7	-13.9	-4.8	-5.8	0.4	-17.9
JU - JAT AIRWAYS	180.8	189.7	370.3	51.2	-17.0	-15.3	-12.9	-1.4	0.5	-32.1
KL - KLM ROYAL DUTCH AIRLINES	4 900.4	16 657.7	21 699.3	76.8	-6.5	-4.9	-1.7	-2.6	970.7	-17.8
KM - AIR MALTA	238.8	360.0	547.1	65.8	-9.3	-7.5	-4.6	-2.1	1.8	-0.4
LG - LUXAIR	151.0	83.9	168.5	49.8	-9.7	-11.5	-4.7	-3.8	0.0	-50.0
LH - DEUTSCHE LUFTHANSA AG	11 549.0	26 532.1	35 668.5	74.4	-7.3	-7.1	-3.3	-3.1	1 497.7	-26.3
LO - LOT POLISH AIRLINES	703.6	1 004.6	1 668.9	60.2	-22.0	-23.3	-15.9	-5.9	12.9	-38.1
LX - SWISS INTERNATIONAL AIRLINES	2 914.0	6 222.2	8 500.1	73.2	-1.7	-1.5	3.4	-3.6	265.5	-16.0
MA - MALEV HUNGARIAN AIRLINES	523.1	559.7	1 053.5	53.1	-13.1	-28.3	-20.3	-5.9	0.8	-68.2
OA - OLYMPIC AIRLINES	918.1	1 043.3	2 175.6	48.0	-16.4	-21.1	-5.3	-9.6	11.1	-35.0
OK - CZECH AIRLINES	850.6	991.1	1 865.3	53.1	-12.2	-14.9	-6.9	-5.0	6.1	-8.6
OS - AUSTRIAN	1 763.6	3 112.5	4 583.3	67.9	-14.5	-16.4	-11.6	-3.9	71.7	-31.6
OU - CROATIA AIRLINES	301.1	180.5	365.5	49.4	-2.8	-4.8	10.3	-7.8	0.5	-6.6
PS - UKRAINE INTERNATIONAL AIRLINES	158.9	278.9	555.0	50.3	-14.8	-15.7	5.2	-12.5	2.3	33.1
RO - TAROM ROMANIAN AIR TRANSPORT	312.3	358.9	778.0	46.1	-16.3	-20.1	2.8	-13.2	0.9	-35.7
SK - SAS SCANDINAVIAN AIRLINES	4 929.8	5 130.9	8 135.1	63.1	-17.2	-18.1	-9.2	-6.9	82.3	-34.9
SN - BRUSSELS AIRLINES	951.5	1 373.5	2 477.7	55.4	-21.1	-18.1	-12.5	-3.8	20.0	-21.9
TK - TURKISH AIRLINES	4 853.8	7 457.0	11 191.4	66.6	10.1	11.3	17.4	-3.7	133.6	30.4
TP - TAP PORTUGAL	1 744.3	4 468.0	7 467.4	59.8	-7.1	-7.7	-2.1	-3.7	62.5	-20.4
VS - VIRGIN ATLANTIC AIRWAYS	1 239.7	9 169.6	12 788.1	71.7	-9.3	-8.5	-4.3	-3.3	325.7	-15.4
VV - AEROSVIT	297.0	740.4	1 121.8	66.0	-20.6	-15.9	-13.9	-1.6	3.4	-31.7
AEA	65 695.0	159 059.4	222 785.2	71.4	-9.5	-7.3	-3.7	-2.7	7 076.1	-19.6

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* Estimated Data

28/04/2009